



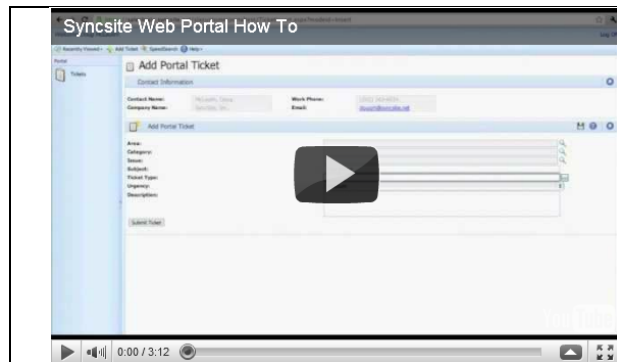
SyncSite Web Portal is a self-service solution that enables you to add and edit tickets. You can click Add Ticket on the menu bar to add a new ticket, or use the Tickets List view to find an existing ticket. From the Ticket Detail view, you can view ticket information, add or edit an attachment or add comments.

## Logging in to the SyncSite Web Portal

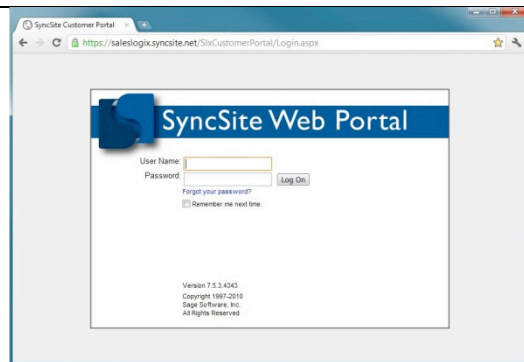
Before you begin, locate your User ID and password. If you do not have this information, contact your system administrator.



If your Web Client connection has expired or you have logged out of the Web Client, the logged off screen appears. To return to the log in screen, click Log in to the SyncSite Web Portal



To View the SyncSite Web Portal How To Video Click [Here](#)



To Log on to the Portal, Click [Here](#)

### To log on

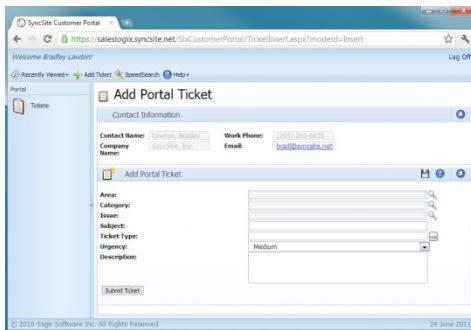
1. Connect to Web Portal - This can be done several ways, depending on your browser. In many browsers, it is faster to set the initial screen as the default screen of your browser, or to add the initial screen to a list of favorite sites.
2. Type your User Name and Password - Passwords are case-sensitive. In addition, your system administrator may set restrictions on using blank passwords, your user name as a password, and other options. If necessary, see your system administrator to discuss your password options.
  1. Click Log On.

# Adding a Ticket in Web Portal

Use the Create Ticket dialog box to add a new ticket for your issue. The system will automatically insert your name, company name, work phone, and e-mail information.

To add a ticket

1. On the toolbar, click Add Ticket.



2. Click the Find button next to the Area, Category or Issue box, select the appropriate items from the lists, and then click OK. - The Category items listed depend on the option you selected for Area and the Issue items available depend on the option you selected for Category.
3. In the Urgency box, click the dropdown arrow and select from the list.
4. In the Description box, enter the complete details of the problem.
5. Click Save - The Ticket Detail view appears.
6. You can click the Comments tab to add comments to a ticket. Comments provide the Customer Service representative reviewing tickets with more details about the issue.
7. You can click the Attachments tab to add attachments to a ticket. Providing attachments for a ticket can help the Customer Service representative to better understand the issue.
8. When all information is complete, log out or click Add Ticket to add another ticket.

# Using the Ticket Detail View in Web Portal

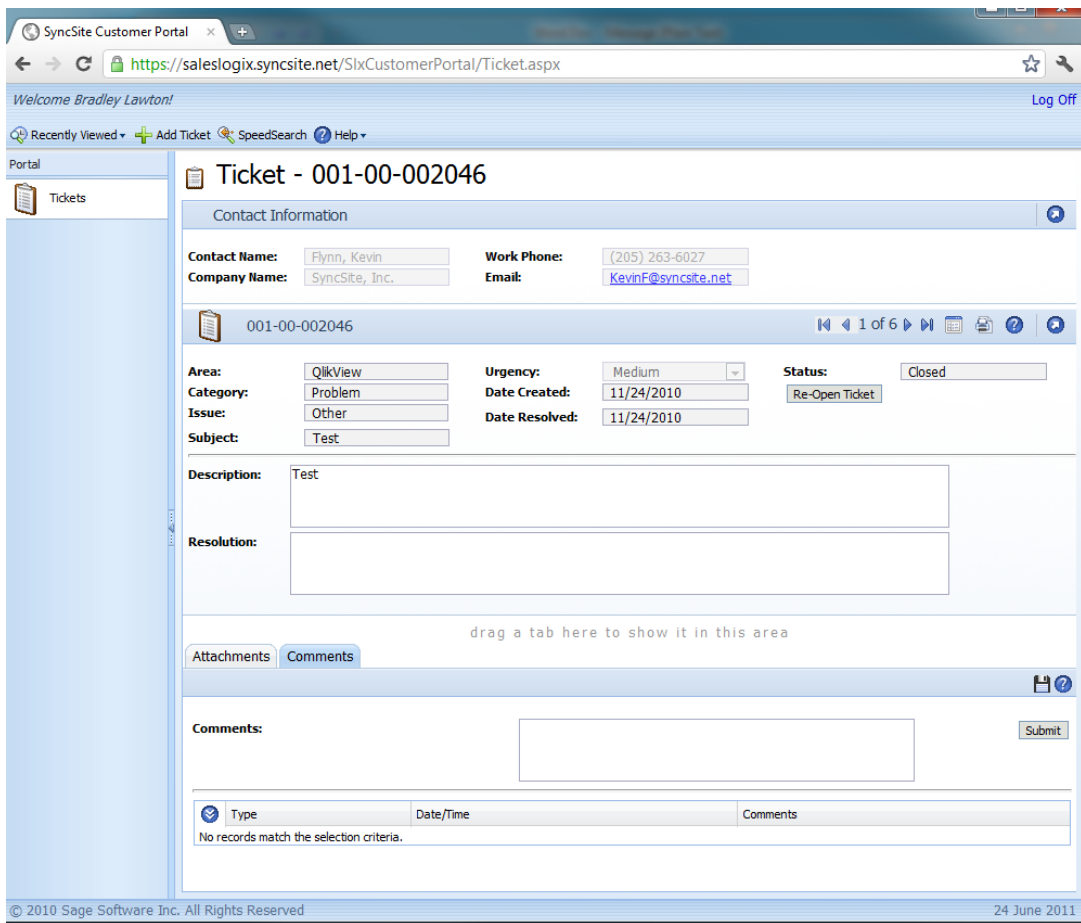
You can use the Ticket Detail view to see in-depth information about a ticket, close a ticket, re-open a closed ticket, or to add comments or attachments to a ticket. There is no time limit on when a ticket can be reopened.

The Ticket Detail view consists of three sections:

- The top section displays basic contact information about the selected ticket, such as the company name and contact information, including the phone number and e-mail address.
- The middle section of the view displays specific details about the problem, such as the Ticket ID number, area, category, issue, subject, urgency of the problem, creation and resolution dates, description of the problem, and the resolution.

The bottom section of the view contains the Comments and Attachments tabs.

Information entered on the Comments tab is considered a ticket activity by SyncSite and is used by the assigned Customer Service representative. Attachments, such as screen shots or error messages, provide more information about the problem.



## Using the Ticket List View

You can use the Ticket List view to find a ticket, to view tickets by group, to add a new ticket, or to search the indexes for information.

To find a ticket

1. On the Navigation Bar, click Tickets.
2. Use the Lookup to search for ticket records - All searches are run on the tickets you can access.
3. Click the Ticket ID hyperlink to open the detail view for the ticket.

To view tickets by group

- On the Tickets List view, in the Ticket Group list, select from Web Portal All Tickets, Web Portal Closed Ticket, or Web Portal Open Tickets.

The list of tickets in the selected group appears in the lower area of the view.

To add a new ticket

1. On the toolbar, click Add Ticket.
2. Follow the steps for adding a ticket.

## **Comments Tab**

To add comments to a ticket

1. On the Navigation Bar, click Tickets.
2. Use the Tickets lookup to find the ticket.
3. Select the ticket.
4. On the Ticket Detail view, click the Comments tab.
5. In the Comments text box, enter your comments for the ticket.
6. Click Submit.

The comments appear in the area below the tabs.

# Attachments Tab

Attachments are files that are linked to a record. The Attachments tab is found on many of the detail views, including the Activity Detail view, and displays a list of attachments for the selected record.

When you make changes to an attached file you can update the attachment so that Remote users can access the updated version. Click a column heading to sort the list according to that column. The columns are Attachment, Modify User, Modify Date/Time, and Size.



If an activity member has calendar access to the activity leader, then the member will be able to add or edit attachments. If the member does not have calendar access, then the member can only view, copy or save attachments.

## To open

### To view attachment information

- Click the name of the file you want to view or select the file you want to open and click Open.



The Send SLX button in Outlook saves e-mail attachments using one of the following methods:

- E-mail attachments are saved as individual files
- A single e-mail attachment that contains the e-mail and all attachments

### To download an attachment

1. Right-click the file name, and then select Save Target As.
  2. Navigate to the appropriate directory, and in the File Name box, enter file name, and then click Save.
  3. Click OK or Close as appropriate to verify download success.
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